



# BARTENDER

## Release Notes

# 1.4.0.12 Release

2 June 2019

## New Features & Improvements

### Documents

You can now attach **Documents** to a Supplier's quote in a job.

- Supplier quotes now have a new option called **Manage Documents** in the **Quotes Comparison page** (Formerly called Trade Package Comparison) .
- From here you will be able to **Add, Preview, Download** or **Delete Documents**.

### Formula

You can now perform simple Mathematical calculations on the **Quotes Comparison** page.

- You can **Add, Subtract, Multiply, Divide** and calculate **Percentages** or perform a combination of these operations on an Item rate, Item total, Trade heading, Quote total or a selection of rates or totals in a quote.
- Calculations will follow the **BODMAS** rule (Brackets, Orders, Division, Multiplication, Addition, Subtraction) where applicable.

### Second Opportunity Column

You now have the advantage of multiple ways to calculate Opportunity for a Trade Package.

- The **Second Opportunity Column** is available in the **Column chooser dropdown** on the **Review page**.
- You can find your Opportunity in **Picked v Estimate, Picked v Second Cheapest** and **Second Cheapest v Cheapest**.

## Other Improvements

- The **Trade Packages** tab is now called the **Quotes** tab to better reflect its functionality.
- You can now **Find** a job on the **Jobs** page.
- You will now see an alert when you are about to create a **Manual Total** on a **Heading** or **Quote total**.
- When you pick the **Estimate**, **Opportunity** will be calculated only when no Supplier quotes have been added.
- You have better zoom control on the **Quotes Comparison** page.
- You will now be notified when downloading a **Report** is complete.
- We've improved notifications on the **Quotes Comparison** page, so you are notified of the effect of adding or editing rates, totals and headings.
- When you zoom in, the buttons on the **Quotes Comparison** page will be available as options in a dropdown menu button.
- We've improved the loading performance of the **Quotes Summary** page.
- **Teams** dropdown has an improved design.
- **Reports** will now have the **Date** and **Time** of Report generation.

## Fixes

- Fixed an issue where you could not add an **Adjustment** by Value on the **Review** page.
- Fixed an issue where **Pro rata from Estimate** was incorrect if an item had a negative quantity.
- Fixed an issue where an item with a quantity of 0 would cause the **Picked** total in **Cubit** would be different to the job total in **Bartender**.
- Fixed an issue where an item with a negative quantity would have a rate of 0 if Include all items was used to fill a quote.
- Fixed an issue where the **Job Overview** total would not update if the job had quantities updated from **Cubit**.

- Fixed an issue where **Comments** on a **Supplier** quote on the **Quotes Comparison** page would not display if you refreshed the page.
- Fixed an issue where scrolling down would sometimes affect display on **Quotes Comparison** page .
- Fixed an issue where highlighting an **Adjustment** quote and filling with **Estimate** would throw an exception.
- Fixed an issue where a **Supplier** quote without item rates and totals could be picked.
- Fixed an issue where sending a job from **Cubit** to **Bartender** would fail if the address was long.
- Fixed an issue where **INCL** had a value when it was not under a **Manual total**.
- Fixed an issue where multiple decimal places would be displayed when editing a Supplier rate or total.
- Fixed an issue where **Find** on **Quotes Comparison** page would not highlight all found results.
- Fixed an issue where **Primary contact** would not be populated when adding an existing Supplier's quote to a trade package.
- Fixed an issue where the **Trades** dropdown on **Supplier details** page would not display properly.
- Fixed an issue where you could not close the **Find** window on **Quotes Comparison** page using the Esc key.
- Fixed an issue where the **Combined** column on **Review** page had the **Unentered** icon when all items had rates.
- Fixed an issue where Assigning or Unassigning a **User** from a **Team** would throw an exception.
- Fixed an issue where you would sometimes be unable to copy a value to a selection of cells.
- Fixed an issue where long Supplier names were truncated in **Excel** reports.

# 1.3.5.2 Release

5 May 2019

## Improvements

- Added Cubit 9.1 Support
- If you have deleted or modified trades or items in Cubit, you will now see a notification with details of any quotes you will affect as a result of the update.
- Bartender now has improved client side logging for better error tracking.

# 1.3.3.0 Release

24 February 2019

## Improvements

- **Pro rata from Estimate** is now the default option to fill a quote in the **Add Quote** window.
- You will now see a tooltip when you edit under a **Manual Total** on the **Trade Package Comparison page** saying “This won’t affect the Quote Total as it is part of a Manual Total”.

# 1.3.0.1 Release

17 January 2019

## Fixes

- Fixed an issue where the value of **INCL** could sometimes change when it wasn't under a manual total.
- Fixed an issue that allowed you to edit a job while it was being updated from Cubit.
- Fixed an issue where applying **INCL** to all items under a Trade Heading in Cubit could sometimes not allow you to **Pick** or **Fill** within Bartender.

# 1.3 Release

4 December 2018

## New Features & Improvements

### Teams

To better control permissions and Job visibility, an **Admin** can now group users into **Teams**. You can create multiple Teams within a Company, or create none.

- A **Manager** and **Trusted User** in a **Team** can only see Jobs within that **Team**, or Jobs shared directly to them.
- Users can be assigned to one, or many **Teams**.

### Trusted Users

We've added a new User type, called **Trusted Users**. When set to a **Trusted User**, you can see all Jobs across the company, or if you are assigned to a **Team**, you can only see all Jobs within that **Team**.

- Only **Admins** can change any new or existing users to a **Trusted User** from the User Management page.

### Supplier Management

You can now create a Supplier without having to Add a Quote and also access and edit the details for any Suppliers you've added to your Jobs.

#### Suppliers Page

- You can filter through your Suppliers by **Preference** or **Trade**, and sort them by **Name**, **Preference**, **Active Quote**, **Success** or **Address**.
- You can use **Find** to search your Suppliers by **Supplier** name, **Contact** name, **Address** or **Description**.



## Supplier Details

- You can now add more details for a Supplier, including **Business Number, Address, and Contacts**.
- You can now preference a Supplier, marking them as **Like** or **Dislike** and associate the Supplier with one or more **Trades**.
- There is a Quotes Summary that will show you all Quotes that have been submitted for any In Progress Jobs you own and all in Progress Jobs within the account and also see the lifetime success of Picked Quotes and Totals against Submitted Quotes and Totals.
- You will be able to see all submitted Quotes, be able to go to the **Job Details** page or **Trade Packages** page for each Quote..

## Organise Quotes

You can now organise Quotes from the **Trade Packages Summary** and **Comparison** page.

- You can drag and drop Quotes from the **Trade Package Summary** page.
- You can use the Quotes options on both the **Comparison** and **Summary** page to move a Quote to the Top/Left or Bottom/Right.

## New Shortcut Keys

New Shortcut keys have been added to the **Trade Package Comparison** page.

- You can mark a selection as **Temp** by using **T**.
- You can mark a selection as **Supplier** by using **S**.
- You can **Fill from Estimate** by using **L**.

## Improved Alerts and Tooltips

We have improved how tooltips and warning messages are displayed throughout Bartender.

- Tooltips from the buttons in the **Trade Comparison** page will only show when you have clicked a button.
- Tooltips for the buttons in the **Trade Comparison** page have been rewritten to better communicate what is happening.
- All warning notifications have been rewritten to most clearly convey what is happening.

## Other Improvements

- You can now delete a Quote if you've sent the wrong View to Bartender.
- You can now rename a Job in Bartender at any time.
- We've improved the labels that appear in the Browser tab, so you can tell what Job or page you are on.
- The Trade Package list will now update as it is changed in Cubit.
- You can mark an entire Quote as **Temp** or **Supplier** from the Quote Total.
- **First names** and **Last names** will now be shown everywhere in Bartender where previously only a User's **First name** was shown.
- When using **Go to Unentered** and **Go To Unpicked**, the Unentered or Unpicked rate will now show at the top of the comparison grid.
- There is a **User Option**, that will allow you to show the **Estimate Total** for Trade Packages if nothing is Picked for that Trade Package in the **Job Review** page and for Reports generated from Bartender.
- Trade Package names in the Trade list on the **Trade Package** page will display bold when anything in that Trade Package is Picked.
- From the filter drop down on the **Jobs** page, suspended users are shown under active users.
- **Cheapest** and **Average** are now calculated per Item.
- The **Jobs** page now remembers the sort order.

## Fixes

- Fixed an issue where the **Edit Quote** window would show the **Adjustment** total.
- Fixed an issue where you could add an **Adjustment** on the **Review** page when the Trade package did not have a Picked Quote.
- Fixed an issue where **Pro rata from Estimate** was sometimes incorrect if the estimate from **Cubit** did not have rates.
- Fixed an issue where the **Plug Percentage** was different on the **Trade Package Summary** and the **Review** pages upon deleting some item rates and totals under a manual heading.
- Fixed an issue where the items with **INCL** having a value of 0 would sometimes have a different value after an update was sent from **Cubit**.

- Fixed an issue where navigating from the **Job Details** page to the **Trade Package Summary** page would cause the page to load twice.
- Fixed an issue where the **Supplier** name could not be edited from the **Edit Quote** window.
- Fixed an issue with the **Replace** function where unpriced items under a manual total could not be filled using the **Pro rata** from Estimate option.
- Fixed an issue where you couldn't set a quote as **Temp** or **Supplier** using the Temp and Supplier buttons on the **Trade Package Comparison** page.
- Fixed an issue where an Account could be created without an **Admin** role.
- Fixed an issue where entering brackets in **Find** would cause Bartender to freeze.
- Fixed an issue where the trade package name would appear cut off in the **List of Suppliers** report.
- Fixed an issue where slow data entry in the **Find** field would not highlight the Item description if it was the only item found.
- Fixed a performance issue where using **Fill** on a quote from **Estimate** or **Supplier** would take longer than usual.
- Fixed an issue where adding an **Adjustment** quote to an unpriced quote with the Adjust by value option would return an empty quote.
- Fixed an issue where the status of the **Pick** button would not update when a picked quote was deleted.
- Fixed an issue where the status of the **Pick** button would not update when the Estimate rate was picked.
- Fixed an issue where the **Trade list** on the **Trade Package Comparison** page would not refresh when deleting a picked quote.
- Fixed an issue where the logged in **User** could Suspend themselves from the **User Management** page.
- Fixed an issue with the alignment of columns on the **Jobs** page.
- Fixed an issue where the **Owned by** column would say Deactivated User instead of **Suspended User**.
- Fixed an issue where switching between **Admin** and **User** roles would throw an exception.
- Fixed an issue where you sometimes couldn't use the Backspace button in the **Find** field on the **Trade Package Comparison** page.

- Fixed an issue with the spacing between **Edit** and **Delete** options and the **Save** and **Cancel** buttons in the **Notes** Component.
- Fixed an issue where picking the **Estimate** rate for items that have no rates and a manual total as **INCL** or **EXCL** would populate the **Estimate** rate with INCL or EXCL.
- Fixed an issue where reassigning a job on the **Details** page would display multiple notifications.
- Fixed an issue where the Footer on the **List of Suppliers** report was incorrectly aligned.
- Fixed an issue where the user wasn't notified of an incorrect password in the **Change Password** window.
- Fixed an issue where pressing Enter would not close the **Edit User** window.
- Fixed an issue where the password couldn't include the special character '&'.
- Fixed an issue with the loading performance of the **Review** page.
- Fixed an issue where exceeding the limit of 500 characters in **Notes** would display an error message
- Fixed an issue where the **Admin** could resend a confirmation email to a **Suspended User**.
- Fixed an issue where the **Trade Package Comparison** page would not refresh for an update from Cubit that has changes to the **Unit** or **Bill Reference** of an Item.
- Fixed an issue where the **Combined** cell in the **Review** page would not display the warning icon for Unpicked Items.
- Fixed an issue where shortcuts for thousands and millions did not support uppercase K and M respectively.

## Compatibility

Bartender 1.3 is designed to work best with Cubit 9.0.1 or higher.

# 1.2.0.10 Release

31 July 2018

## New Features & Improvements

### Go To Unentered and Unpicked

You can now click the warning icon for unentered and unpicked Items, and be taken to the **Trade Package Comparison** page where you can see the missing Rate.

- You can click on the warning icons from the **Trade Package Summary** and **Review** pages.
- There is a new option in the **Trade Package Comparison** page when you have the Picked column selected, you can **Go To Unpicked**.

### Job Notes Report

You can now generate a Report which will collate Notes from across all Trade Packages and Users across a Job.

- You can generate **Job Notes** Report for PDF or Microsoft Excel.
- You can see the **Note**, the **Author** and the **Date** and time the note was created.

### List of Suppliers Report

You can now see all the Suppliers that have contributed Quotes within a Job.

- You can generate **List of Suppliers** Report for PDF or Microsoft Excel.
- List of Suppliers will show you **Supplier** name, **Contact** name, **Email** and **Phone** number.

### Other Improvements

- We've added time to the Job page, so you can see exactly when a Job was **Created** or **Received** from Cubit.

- You can now enter a percentage for an **Adjustment** from the **Review** page.
- Added label for **Notes**.
- Changed the Jobs label in the **Users** page to **Assigned Jobs**.
- We've updated all drop down menus to be consistent throughout Bartender.
- Clicking the Buildsoft logo on the Bartender Login page will now direct you to the Buildsoft website.

## Fixes

- Fixed an issue where you couldn't add a Supplier if the **Email** for that Supplier included any uppercase characters.
- Fixed an issue where the **Trade Package Comparison** page would sometimes not load.
- Fixed an issue where the **Trade List** jumped when you scrolled down through it.
- Fixed an issue where the tooltip on the the Trade list would not show for long Trade Package names.
- Fixed an issue on the **Trade Package Comparison** and **Review** pages where columns were not lining up correctly when the **Notes** were expanded.
- Fixed an issue where you could not use Enter on the keyboard from **the Add Quote** window if you selected any option beside **Include all Items**.
- Fixed an issue where you sometimes couldn't update you password.
- Fixed an issue where sometimes the **Last Saved** time was wrong.
- Fixed an issue where you weren't always logged out after 60 minutes of inactivity.
- **Fixed an issue where the Prohibition Icon was displayed when hovering over the Verified Icon on the Users page.**
- Fixed an issue where **EXCL** had a value other than 0.
- Fixed an issue where a deleted value from the heading of a Quote could populate every remaining cell in that Quote.
- Fixed an issue where the **Delete Heading** confirmation was displayed when the heading was not populated.

- Fixed an issue where Picking the Estimate and a Quote would not update the **Plugs** percentage on the **Trade Package Summary** page.
- Fixed an issue where editing an existing **Contact** for a Quote, could duplicate that **Contact**.
- Fixed an issue where you couldn't **Delete** a Rate in a Quote when an item did not have an Estimate rate.

## Compatibility

Bartender 1.2 is designed to work best with Cubit 8.2.4.

# 1.1.1.3 Release

21 June 2018

## Fixes

- Fixed an issue where an error message was sometimes displaying when adding a new Supplier to a Quote.
- Fixed an issue where sending a Cubit Job grouped with Codes in a hierarchy was creating a corrupt Job in Bartender.
- Fixed an issue where the Map in the **Job Details** page was not displayed.



# 1.1.0.26 Release

14 June 2018

## New Features & Improvements

### Restore Jobs

You can now **Restore** a Job in Bartender, so you can backup your Jobs.

- You can **Export** your Job as a .BTX file to your computer.
- You can **Restore** your Job at any time.

### User Management

We've redesigned the **Users** page, and added new functionality so you can better manager Users in your Bartender account.

- Admin can now **Add, Edit** and **Suspend** Users.
- You can now view when a User was created and last active and how many Jobs a user has assigned to each User.
- By default your Users will be filtered to show only **Active Users**, you can change this filter to see **All Users** or **Suspended Users**.
- You can sort **Users by Name, Email, Last Active, Type, Jobs, Created, or Status**.

### Other Improvements

- The Trade List on the **Trade Package Comparison** page is the same as the **Trade Package Summary** page; the total will be coloured to denote a Picked Total, you will see any warning icons for unpicked Items and Update notifications.
- Estimate total is now displayed on the **Summary** row of the **Review** page.
- **Reports** will generate faster, and until a report is generated the other options are disabled.

- Improved interaction with the ellipsis dropdown menus.
- You can use Ctrl + Enter to save a Note.

## Fixes

- Fixed an issue where **Edit Quote** and **Delete Quote** were positioned incorrectly in the **Trade Packages Summary** page.
- Fixed an issue where the warning icon for unpicked Items would be displayed in the **Trade Package Summary** and **Review** pages after the quote was deleted.
- Fixed an issue where using **Fill from Supplier** in a Quote was not showing all Items as a Supplier plug.
- Fixed an issue where the bar graph for the **Estimate** would load twice when navigating between Trade Packages on the **Trade Package Summary** page.
- Fixed an issue where a long Trade name would change the layout of the **Trade Package Summary** page and the **Add Quote** window.
- Fixed an issue where double clicking **Remove Quote** from the **Remove Quote** confirmation window would disable the **Trade Package Comparison** page.
- Fixed an issue where changing an Item in Cubit between INCL and EXCL, and then Updating the Job in Bartender, would not automatically refresh an open **Trade Package Comparison** page.
- Fixed an issue where the the time shown in **Last saved** was not considering all changes.
- Fixed an issue where you had to refresh page for **Job Overview** to show the latest Total when picking a Quote from the **Review** page.
- Fixed an issue where using **Find** would edit the previously selected **Rate** or **Total** cell from a Quote within the **Trade Package Comparison** page.
- Fixed an issue where any filetype could be uploaded as a user profile image.
- Fixed an issue where a user profile image was displayed within an oval instead of a circle.